

Tab 1

[New hire] onboarding plan

Homework to complete

First week

Meet with these people at a minimum (*e.g., members of the team, CEO, COO, etc.*)

- ☐
- ☐
- ☐
- ☐

Review docs from our FY2026 company kickoff

- ☐ [Company vision and narrative](#)
 - *[What the doc is and why it matters]*
- ☐ [Big departmental bets](#)
 - *[What the doc is and why it matters]*

Start exploring, digging into everything, and soaking up as much as you can

- ☐ *Read through old presentations, plans, etc., and ask questions*
- ☐ *Get familiar with our HubSpot setup (key fields, data capture, reporting, etc.)*
- ☐ *Read through [the GTM Playbook](#)*

Get access to our tech stack

There's a much more detailed breakdown of each tool [here](#). Think of this as a checklist for you to work from and get access to everything you need.

Email:

Password:

- ☐ Google Suite
- ☐ Notion
- ☐ Gong
- ☐ HubSpot
- ☐ Asana
- ☐ Loom
- ☐ Zoom

- ☐ Slack
- ☐ RevenueHero
- ☐ Koala
- ☐ Unify
- ☐ Clay
- ☐ HeyReach
- ☐ Zapier
- ☐ Keyplay
- ☐ Google Analytics
- ☐ Google Search Console
- ☐ Google Tag Manager
- ☐ WordPress
- ☐ Google Ads
- ☐ LinkedIn Ads
- ☐ Semrush
- ☐ Shield (LinkedIn Analytics)

First two weeks

- ☐ *Meet with some of the Sales team:*
 - ☐ *E.g. VP of Sales to better understand their priorities, get their POV what's working vs. not working, and how you can support their team*
 - ☐ *E.g. AE to better understand their focus areas, get their POV what's working vs. not working, and how you can support them / the AEs*
 - ☐ *E.g. SDR Manager to better understand their team's focus areas, get their POV what's working vs. not working, and how you can support the SDRs*
- ☐ *Draft your v1 30-day plan for review*
- ☐ *Meet with relevant agency / freelance partners:*
 - ☐
 - ☐

First month

- ☐ *Meet the rest of these names at a minimum:*
 - ☐ *E.g. SDR to better understand how they've ramped up so quickly (they've only been here a few months) and get their POV on what's working vs. not working*
 - ☐ *E.g. SDR to better understand why they're our highest performing SDR and what others should be doing to replicate their performance*
 - ☐ *E.g. Senior Product Manager to better understand our product, recent releases / momentum, existing product gaps, and what's coming this year*

- ☐ *E.g. VP of Customer Success to better understand their CS world, get their POV on what's working vs. not working, and how we can work more closely with their team*
- ☐ *Finalize your 30/60/90-day plan so you have clarity on what success looks like*
- ☐ *Review FY2025 and FY2026 pipeline models, Marketing budgets, and OKRs*
- ☐ *Finish your 30-day listening tour and document your initial findings, key learnings / surprises, and the big opportunities you've identified*

The lay of the land at UserEvidence

Marketing team

Current state

What's working

Challenges

Opportunities

Big wins last year

Sales team

Current state

What's working

Challenges

Opportunities

Big wins last year

Product & Engineering team

Current state

What's working

Challenges

Opportunities

Big wins last year

Customer Success

Current state

What's working

Challenges

Opportunities

Big wins last year

Company overview and historical context

Board meeting decks

- [FY2025 Q1 \(March 2024\)](#)
- [FY2025 Q2 \(June 2024\)](#)

- [FY2025 Q3 \(September 2024\)](#)
- [FY2025 Q4 \(December 2024\)](#)

Annual and quarterly kickoffs

- [FY2025 Q1 kickoff \(February 2024\)](#)
- [FY2025 Q2 kickoff \(May 2024\)](#)
- [FY2025 Q3 kickoff \(August 2024\)](#)
- [FY2026 annual kickoff \(January 2025\)](#)
 - [Company vision + narrative](#)
 - [Big departmental bets](#)

Important docs, links, and presentations from the Marketing team

- [Latest Sales deck \(January 2025\)](#)
- [Latest Research deck \(December 2024\)](#)
 - [Internal training presentation \(November 2024\)](#)
- [Messaging & Positioning update \(December 2024\)](#)
- [Competitor training \(December 2024\)](#)
- [ROI Studies training \(September 2024\)](#)
- [Sales Resource Center](#)
- [Demo Ranch \(where the existing product tours live\)](#)
- [Marketing team Notion page](#)
- [Fletch homepage project \(June 2024\)](#)

Operations and pipeline planning

Let's spend a ton of time reviewing these docs (and the process behind each one) during your first week when we're working together in person.

FY2026

- [Scenario planning](#)
- [Sales and Marketing plan](#)
- [Detailed Sales plan](#)
- [Marketing budget](#)

HubSpot dashboards

- [FY2025 Revenue Leadership](#)
- [FY2025 - New Business Pipeline Creation](#)
- [FY2025 - Marketing Performance](#)
- [SDR / AE Weekly + Quarterly Progress](#)

FY2025 (historical context)

- [Pipeline model and weekly reporting](#)

- [Quarterly Marketing OKRs](#)
- [Marketing budget](#)

Partners we're currently working with (and why)

[Agency]

Superpower (i.e. what they excel at):

Why we work with them:

Contract:

Context and notes:

[Freelancer]

Superpower (i.e. what they excel at):

Why we work with them:

Contract:

Context and notes:

Meetings you should be aware of

No meeting Tuesdays

Purpose: *Dedicated day for deep work with no scheduled meetings.*

Why it's important: *Gives us uninterrupted time to focus on high-priority projects and strategy.*

Day/Time: *Every Tuesday*

Expectations: *Protect this time for deep work. Only schedule meetings here if it's 100% critical.*

Weekly company update

Purpose: *Weekly company update led by CEO/COO, with each department sharing key updates.*

Why it's important: *Keeps everyone aligned on company goals and progress, and gives us a platform to highlight Marketing wins and priorities.*

Day/Time: *Mondays from 11:30 PM - 2:15 PM ET.*

Expectations:

- *I usually handle the Marketing update, but I expect the team to help update slides beforehand*
- *Everyone gets a calendar reminder to submit their updates. Occasionally, I might call on you if you're closer to a specific update or project*
- *Take a look at [this deck](#) to get a feel for what's expected*

Weekly Marketing team meeting

Purpose: *Weekly team sync to share priorities, challenges, and wins.*

Why it's important: *Keeps the team aligned and gives us a chance to flag roadblocks or share updates on what's working.*

Day/Time: *Mondays from 4:00 PM - 4:25 PM ET*

Expectations: *Show up every week ready to discuss your initiatives, ask questions, and share progress.*

Weekly Marketing update with CEO/COO

Purpose: *1:1 or 1:2 meeting to align on Marketing priorities, get feedback, and manage up.*

Why it's important: *This meeting is huge for creating space for our Marketing team and keeping the co-founders informed.*

Day/Time: *Wednesdays from 3:00 PM - 3:30 PM ET*

Expectations:

- *I meet with Evan and Ray, no one else from our team joins.*
- *You'll need to submit your async updates by **Tuesday EOD** so I can pull everything together into the Notion page on Wednesday morning.*
- *Make sure your updates are clear and concise—this meeting is critical for making progress on our biggest priorities.*

Tools we use that you should be aware of (and why)

Notion

Purpose:

Why it's important:

Details:

HubSpot

Purpose:

Why it's important:

Details:

Gong

Purpose:

Why it's important:

Details:

Important Slack channels

#linkedin-crew

Why we use this channel: *To encourage UE employees to engage on LinkedIn by liking, commenting, and sharing posts.*

When to use this channel: *For sharing new content that needs promotion or to amplify posts from team members*

Who's in this channel: *All UE employees who want to be active on LinkedIn.*

#sales

Why we use this channel: *To share informal updates with the Sales team, provide feedback, share helpful resources, and answer questions.*

When to use this channel: *For communicating updates or sharing information relevant to Sales*

Who's in this channel: *The entire Sales team (AEs and SDRs), Go-to-Market leadership, the Marketing team, and CS leadership*

#general

Why we use this channel: *For company-wide updates, announcements, and celebrations.*

When to use this channel: *To share news, birthday shoutouts, urgent asks, or general updates everyone needs to see*

Who's in this channel: *All UE employees including some external contractors*

Initial thoughts on your 30 / 60 / 90 plan

Your first 30 days

Objective

Goal:

How:

-

Objective

Goal:

How:

-

Objective

Goal:

How:

-

Objective

Goal:

How:

-

Objective

Goal:

How:

-

Deliverable

Your first 60 days

Objective

Goal:

How:

-

Objective

Goal:

How:

-

Objective

Goal:

How:

-

Deliverable

Your first 90 days

Objective

Goal:

How:

-

Objective

Goal:

How:

-

Objective

Goal:

How:

-

Deliverable